SANDATA ELECTRONIC VISIT VERIFICATION (EVV): REPORTS

OBJECTIVES

After completing this lesson, you will be able to:

- Access reports
- Use Daily and Date Range reports
- Sort and filter reports

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INTRODUCTION

- There are multiple reports available within Sandata EVV. Different users may have access to different reports. When reports are generated, they can either be saved as a portable document file (.pdf), Excel (.xls) or a comma delimited file (.csv).

- There are multiple filters that enable the user to retrieve only the data they want to see.

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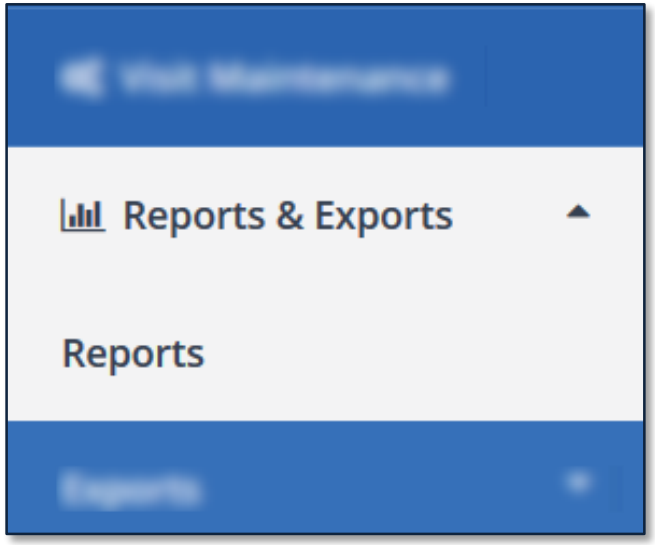
ACCESSING REPORTS

ACCESSING REPORTS

1. Click **Reports & Exports > Reports** on the Navigation panel.



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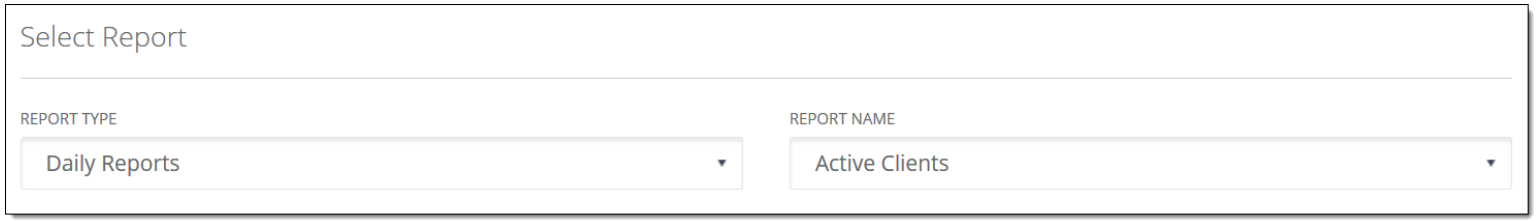
ACCESSING REPORTS

2. The Reports screen displays. This page is broken into 3 sections:
   - Select Report
   - Select Timeframe
   - Select Parameters
3. Select the **REPORT TYPE** and **REPORT NAME** of the report being run.
   - Daily: These reports display results for a selected single date
   - Date Range: These reports display results for a selected date range



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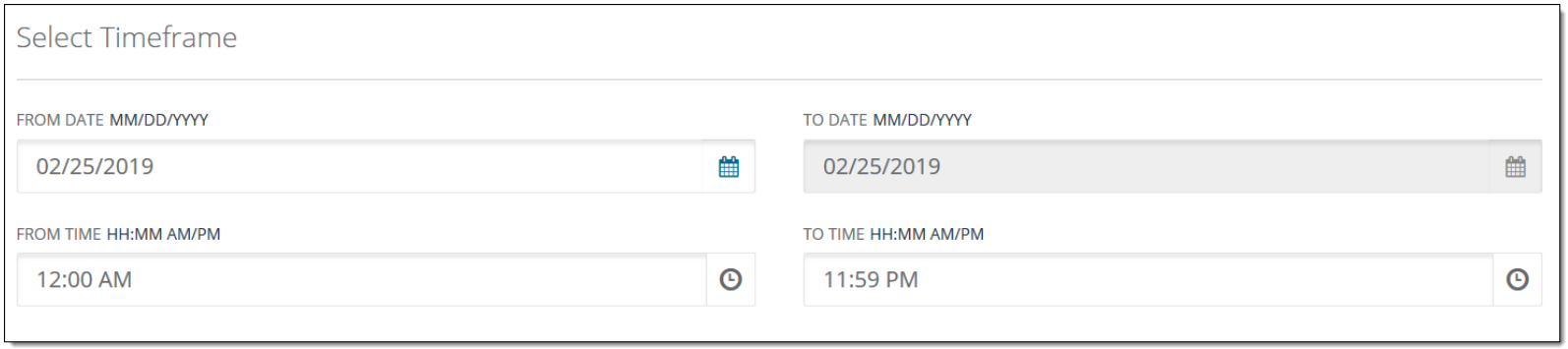
ACCESSING REPORTS

4. Select the time and/or range of the reports being run.

Filter	Description
FROM DATE	Enter the beginning date of the date range
TO DATE	Enter the ending date of the date range
FROM TIME	Enter the beginning time of the timeframe
TO TIME	Enter the ending time of the timeframe



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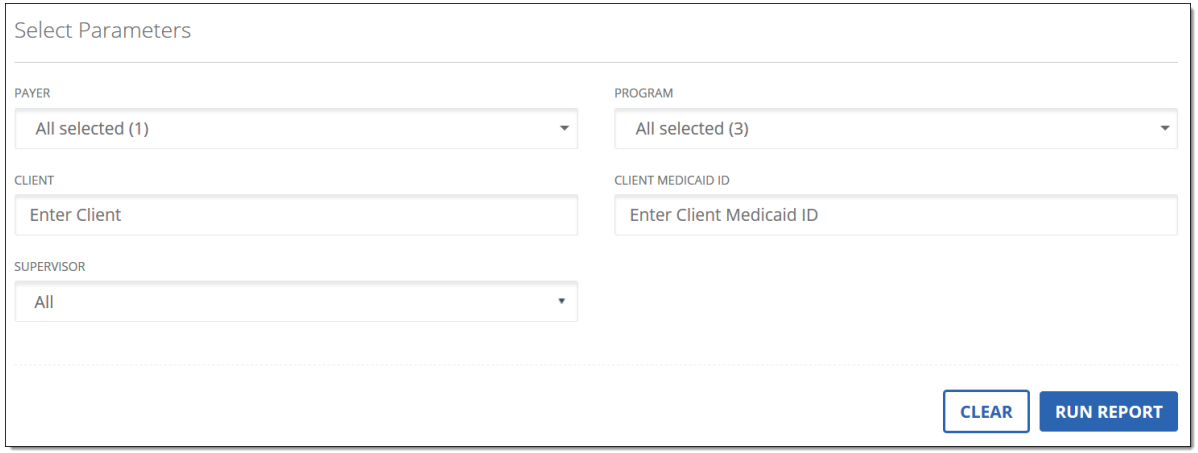
ACCESSING REPORTS

5. Various parameters are available for the user to further limit the report results. Depending on the report selected, the parameters can differ. Common filters include, but are not limited to:

Filter	Description
PAYER	List of payers
PROGRAM	List of programs
CLIENT	Search for the client by last name or client ID
CLIENT MEDICAID ID	Enter the client's Medicaid ID number



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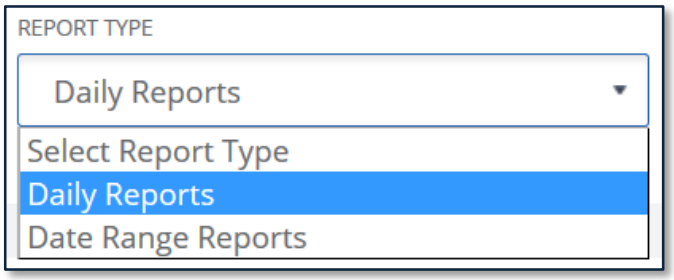
RUNNING A REPORT

RUNNING A REPORT

1. Click **Reports & Exports > Reports** from the *Navigation* panel. The *Reports* screen displays.
2. Select the **REPORT TYPE** AND **REPORT NAME**



TIP

Available reports differ depending upon which report type is selected

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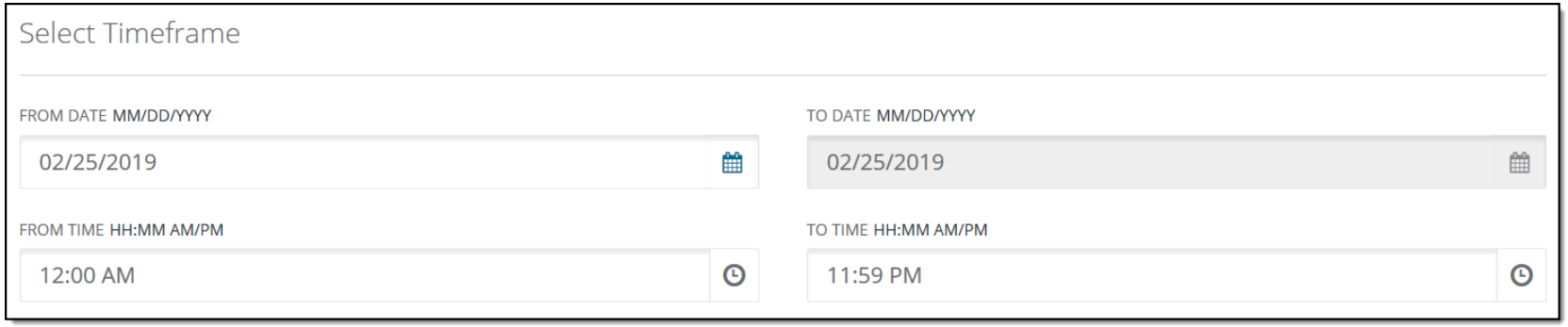
RUNNING A REPORT

3. Enter Select Timeframe information.



For *Daily* reports, the default is always the current day's date. For *Date Range* reports, the default is the past two (2) weeks. Both types of reports can be filtered further by entering time constraints. Maximum date range is 730 days.

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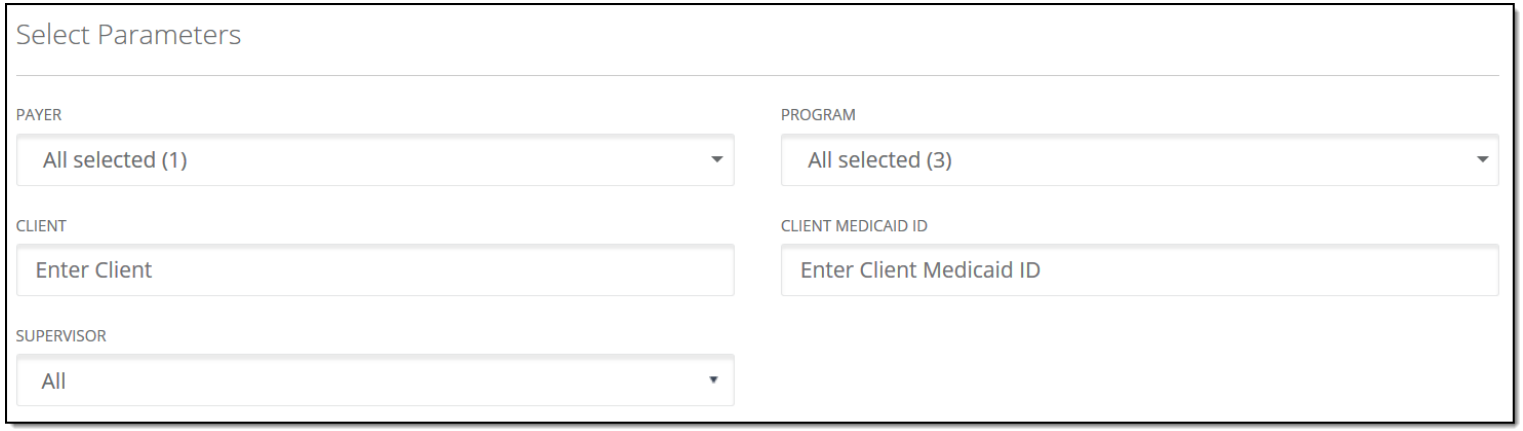
RUNNING A REPORT

4. Set the desired search parameters.



If there is more than one Payer, select from the drop-down list. Neither the PROGRAM nor SUPERVISOR fields are necessary to run the report. CLIENT or CLIENT MEDICAID ID narrows the results to just that client.

TIP

Parameters vary based on the report selected.
To reduce the size of the report and ensure efficiency when running reports with longer date ranges or containing lots of data, it is best to select other parameters such as: CLIENT or CLIENT MEDICAID ID.

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RUNNING A REPORT

5. Click **RUN REPORT**. The *Preview Report* screen opens.

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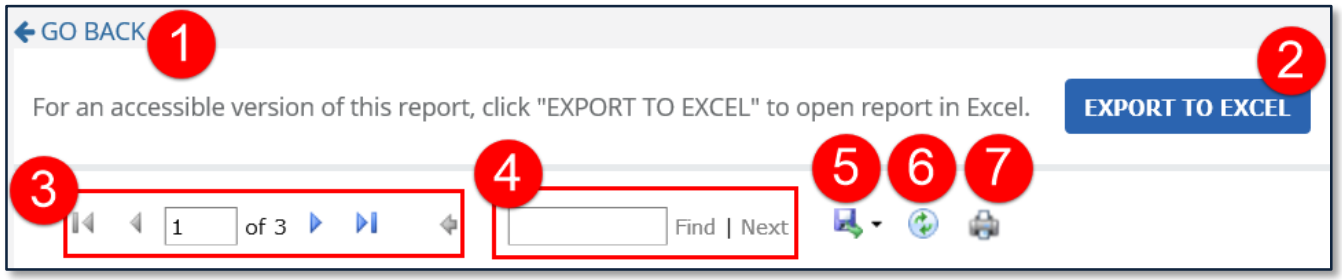
NAVIGATING A REPORT

NAVIGATING A REPORT



1. **Go Back**: This link closes the Preview Report screen and re-displays the report search parameters
2. **EXPORT TO EXCEL**: This button produces an accessible version of the report in Microsoft Excel.
3. **Page Navigation**: This section will display the current page vs. the total number of pages. Navigate to a specific page by typing a number into the current page field and pressing <**Enter**>. The arrows can be used to navigate to the first, next, previous, or last page.
4. **Search Functionality**: Allows you to find data on any page in the report. The Next button jumps to the next instance of the search criteria within the document.
5. **Export**: The report can be exported into several formats: XML, CSV, PDF, MHTML, EXCEL, TIFF file, Word.
6. **Refresh**: Re-runs the report and renews the displayed data.
7. **Print**: Use this button to print the report.

TIP

If all report data is to be in a single table, export as CSV (comma delimited) and open in MS Excel

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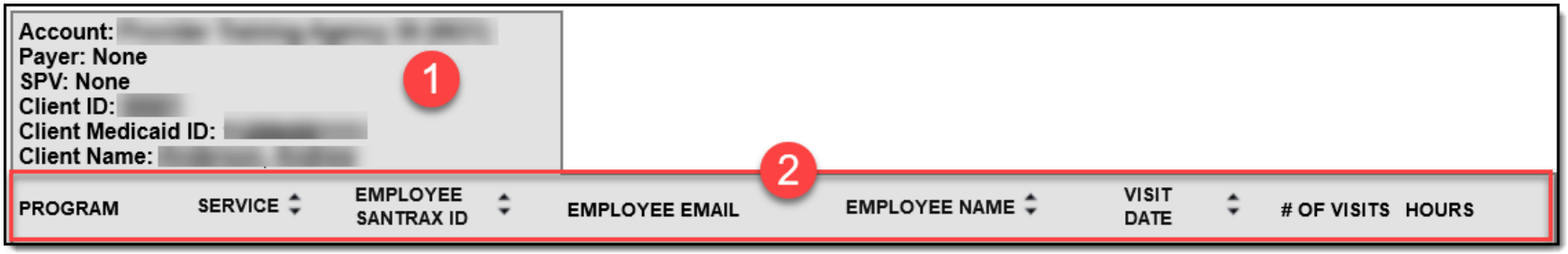
SORTING A REPORT

SORTING A REPORT



1. **Report Grouping Tab:** This tab displays general information pertaining to the report as well as the sections for grouped reports.
2. **Column Header:** Clicking a column's header will sort the results in either ascending or descending order based on that column's content.

If the column header has no arrow ( )next to it, the column cannot be sorted.

When a column is sorted, a visual indicator (/) reveals which column and in which order it is sorted.

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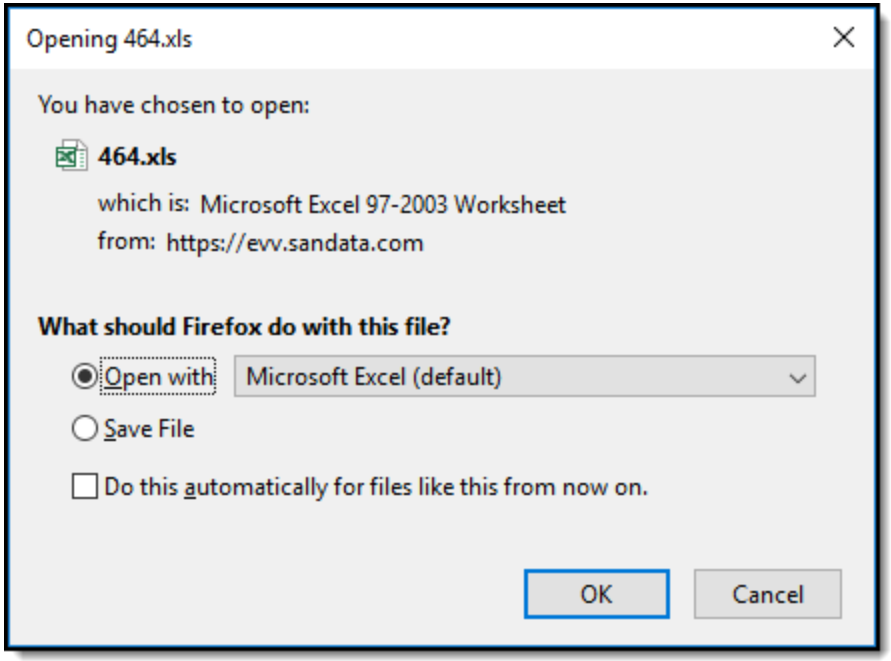
EXPORT A REPORT

EXPORT A REPORT

1. Click **EXPORT TO EXCEL**. The Open Report.xls dialog box displays.



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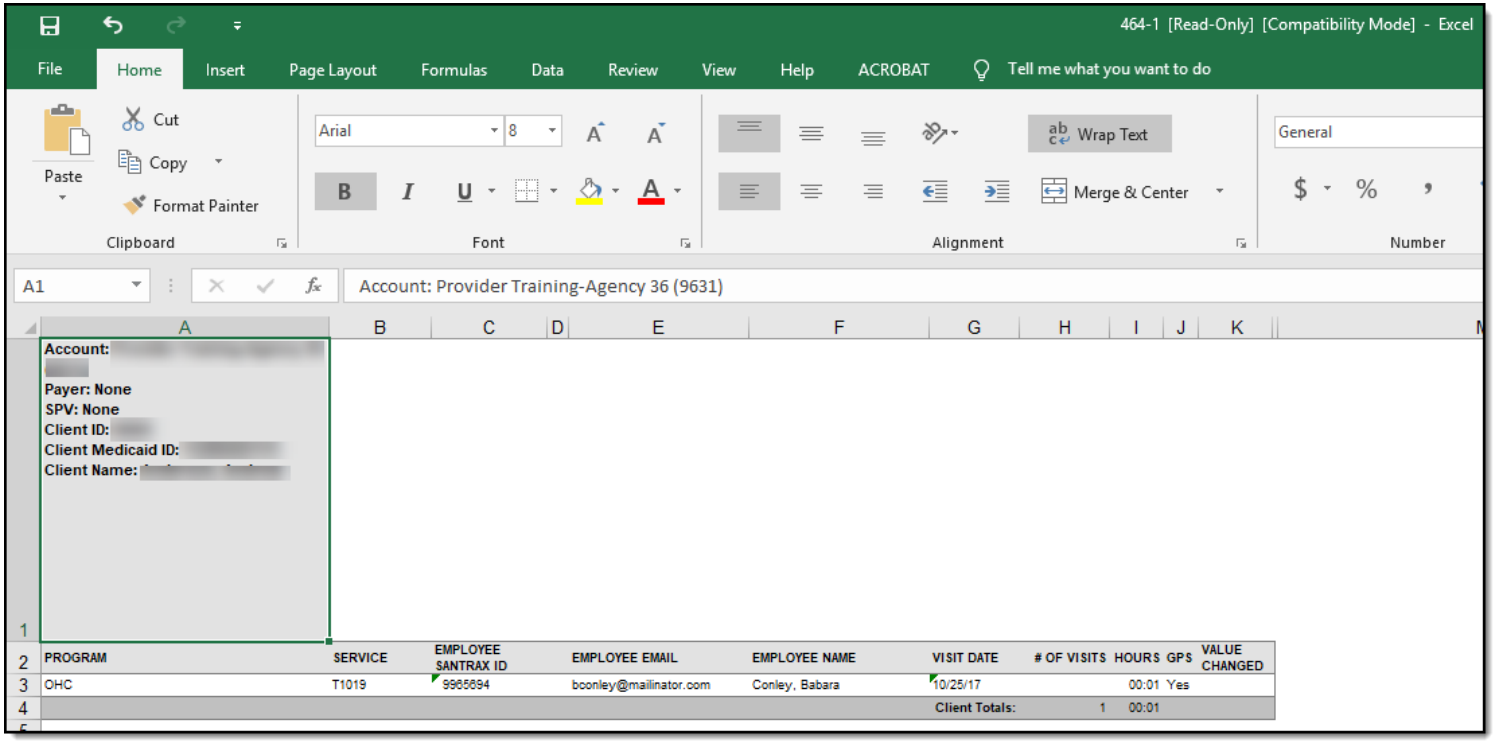
EXPORT A REPORT

2. Click **OK** to export the file. The report opens in Microsoft Excel.



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AVAILABLE REPORTS

AVAILABLE REPORTS

- Role and security level determine the reports available. The reports support monitoring of visits in the field to ensure that client are receiving the services are required.

- The reports also help put together the missing pieces in Visit Maintenance.

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AVAILABLE REPORTS: DAILY: ACTIVE CLIENTS

- This report lists all active clients as of the date selected.

Report Parameters
Account: 10060
For: 9/1/2017 - 9/1/2017 11:59:59 PM

ACTIVE CLIENTS

Account: OH UAT Acct 1 (10060)

CLIENT ID	MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	ADDR VAL	CUSTOM ID
[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	
[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	
[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	

Use this report to view all client's phone numbers, active addresses, identify whether or not an address was verified by GPS, the Medicaid ID (for MVV©). Client ID (for TVV) and the custom ID field for cross reference.

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AVAILABLE REPORTS: DAILY: ACTIVE EMPLOYEES

- This report displays all active employees for the selected date. The report displays the employee ID, employee name, employee email address, phone number and Santrax ID.

Report Parameters
Account: 10060
OH UAT Acct 1
For: 9/1/2017 - 9/1/2017 11:59:59 PM

ACTIVE EMPLOYEES

Account:	OH UAT Acct 1 (10060)				
EMPLOYEE ID	EMPLOYEE NAME	EMAIL	SANTRAX ID	PHONE	DEP
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Use this report to view current employee information and review the employee email address (for MVV) and Santrax ID (for TVV).

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AVAILABLE REPORTS: DAILY: CALL LISTING

- This report displays all call activity from all available call methods for the selected day and time range specified. The calls are listed one after another individually with the beginning pages listing calls with missing data.

Report Parameters
Account:
For: 8/24/2017 - 8/24/2017 11:59:59 PM

Call Listing

Account:
Payer: None
Program: None

SPV	SERVICE	CLIENT ID	MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMAIL	SANTRAX ID	CALL TYPE	CALL TIME	INDICATORS
											G
											G

Grand Total of Actual Calls: 2

Sandata 8/24/2017 10:59:43 AM Page 1 of 2

Use this report to review call activity for the day and time selected. This report allows users to monitor trends in call activity and identify call that require editing, verification, or exception handling.

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AVAILABLE REPORTS: DAILY: CALL SUMMARY

- This report pairs the Start and End calls and calculates the hours worked.

Report Parameters
Account:
For: 8/15/2017 - 8/15/2017 11:59:59 PM

Call Summary

Account:
Payer:
Program: None

SERVICE	CLIENT ID	MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMAIL	SANTRAX ID	CALLS START	CALLS END	HOURS	BILL HRS
G0156							01:31 PM			14400
G0156							11:52 AM	12:07 PM #	0.25	900
G0156							01:08 PM	01:13 PM #	0.08	300
G0156							01:17 PM	01:20 PM #	0.05	180
G0156							12:22 PM	12:29 PM #	0.12	420

Total of Bill Hours: 0.50
Total of Visits: 4
Grand Total of Billed Hours: 14.47
Grand Total of Visits: 27
Grand Total of Completed Visits: 22

Sandata 8/24/2017 12:58:30 PM Page 11 of 12

Use this report to review call activity for the day and time selected. This report allows users to monitor trends in call activity and identify call that require editing, verification, or exception handling.

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AVAILABLE REPORTS: DAILY: VISIT VERIFICATION

- This report provides information for visits on a given date. Reported information for each visit includes all call, adjusted and client verification information.

Report Parameters
Account:
For: 8/15/2017

Visit Verification Report

Account:
Payer:
Program: None
Service: None

				ACTUAL			ADJUSTED			BILL	CLIENT VERIFIED		
MEDICAID ID	CLIENT	EMPLOYEE	DATE	START	END	HOURS	START	END	HOURS	HOURS	SERVICE	TIME	SIGNATURE
	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	11:52 AM	12:07 PM	0.25				0.25			No
	Reason Codes												
	81 (test)												
	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	12:22 PM	12:29 PM	0.12				0.12	Yes		Yes
	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	01:08 PM	01:13 PM	0.08				0.08	Yes	Yes	No
	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	01:17 PM	01:20 PM	0.05				0.05	Yes	Yes	Yes
	Montgomery, Juliet	Smythe, Sylvester	08/15/2017	01:31 PM			01:30 PM	05:30 PM	4.00	4.00			No
	Reason Codes												
	81 (test)												

Sandata 8/24/2017 1:43:58 PM Page 1 of 2

Use this report to view all information about a visit.

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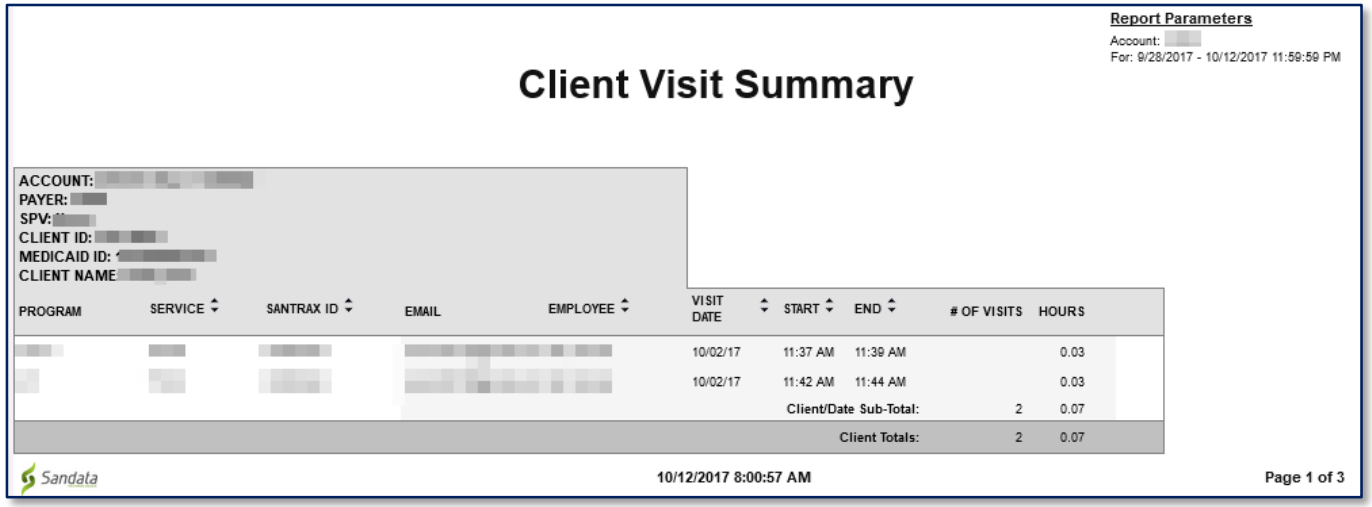
AVAILABLE REPORTS:
DATE RANGE: CLIENT VISIT SUMMARY

- This report shows all visits for the selected date range sorted by client, with each client on its own page. Results are sorted per visit, per service. The report includes basic information such as: visit date, Santrax ID, employee name, number of visits, visit start and end time and visit hours.



Report Parameters
Account:
For: 9/28/2017 - 10/12/2017 11:59:59 PM

Client Visit Summary

ACCOUNT:
PAYER:
SPV:
CLIENT ID:
MEDICAID ID:
CLIENT NAME

PROGRAM	SERVICE	SANTRAX ID	EMAIL	EMPLOYEE	VISIT DATE	START	END	# OF VISITS	HOURS
					10/02/17	11:37 AM	11:39 AM		0.03
					10/02/17	11:42 AM	11:44 AM		0.03
							Client/Date Sub-Total:	2	0.07
							Client Totals:	2	0.07

Sandata 10/12/2017 8:00:57 AM Page 1 of 3

Use this report to review visit hours and information by client. It is a useful tool to review what service were provided to a client for a given time. It also assists in monitoring trends in the services clients are receiving.

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AVAILABLE REPORTS: DATE RANGE: DETAIL VISIT STATUS

- This report is a detailed view of all visits based on the selected date range and parameters. The report groups the client and employee information pertaining to the visit with the visit details such as, exceptions, services, date, time, and the actual/adjusted call-in and call-out times.

Report Parameters
Account:
For: 8/11/2017 - 8/11/2017 11:59:59 PM
: All

Detail Visit Status Report

Account:
Payer: None
Program: None
SPV: None
Status: Incomplete

Visit ID	Medicaid ID	Client	Employee	Service	Date	Scheduled Start	Scheduled End	Call In	Call Out	Adjusted In	Adjusted Out	Exceptions
1763805069			Doe, John		08/11/2017				10:22 AM			Unknown Clients, Visits Without In-Calls
1763805512			Doe, John		08/11/2017				10:25 AM			Client Signature Exception, Service Verification Exception, Unknown Clients, Visit Verification Exception, Visits Without In-Calls
1763820813			Mir, Roman		08/11/2017				11:30 AM			Client Signature Exception, Missing Service, Unknown Clients, Visit Verification Exception, Visits Without In-Calls
Sub Total # of Visits: 3												

Sandata 8/11/2017 12:53:45 PM Page 3 of 4

Use this report to review a detailed overview of all visits within a selected date range. It assists In easily identifying visits that have statuses that need to be corrected. The report can be also printed based on exceptions or visits that need exception handling in order to get them to a verified status for claims validation.

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AVAILABLE REPORTS:
DATE RANGE: SUMMARY VISIT STATUS

- This report is a summary view of the status of all visits based on the selected date range and parameters. The results are grouped by the duration of time each visit has remained in the same status. It shows visits in a 31 day or monthly range.

Report Parameters
Account:
For: 8/11/2017 - 8/14/2017 11:59:59 PM

Summary Visit Status Report

Account:
Payer: ODM
Program: None

	Age					
Status	<1 Days	1 - 5 Days	6 - 10 Days	11 - 15 Days	16 - 31 Days	Total #
In Process	0	0	0	0	0	0
Incomplete	0	12	0	0	0	12
Verified	0	15	0	0	0	15
Processed	0	0	0	0	0	0
Omit	0	0	0	0	0	0
Total #	0	27	0	0	0	27

Sandata 8/14/2017 9:51:25 AM Page 1 of 2

Use this report to review the status of all visits within a selected date range at a summary level. The report provides an easy way to quickly identify those visits requiring exception handling. When visits are identified, users can run a more detailed report for that specific visit to identify and correct exceptions.

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AVAILABLE REPORTS: DATE RANGE: VISIT LOG

- All visits associated with each client within the selected date range are listed with one client per page in this report.

Report Parameters
Account #:
Account Name:
For: 8/8/2017 - 8/14/2017 11:59:59 PM

Visit Log Report

Account:
Payer: ODM
Client Name:
Client Medicaid ID:

Program	Service	SPV	Priority	Employee Name	Visit Date	Call In	Call Out	Actual Hours	Adjusted Start	Adjusted End	Adjusted Hours	Bill Hours	Bill Rate	Reason Codes
None					Wed 08/09	02:23 PM	02:24 PM	0.02				0.02		10, 12, 36, 51
None					Wed 08/09	08:15 AM	09:32 AM	1.28				1.28		10, 11, 12, 35, 35, 36

Sandata 8/14/2017 11:35:14 AM Page 1 of 35

Use this report to track your client's visits by monitoring call times, bill information and reason codes applied.

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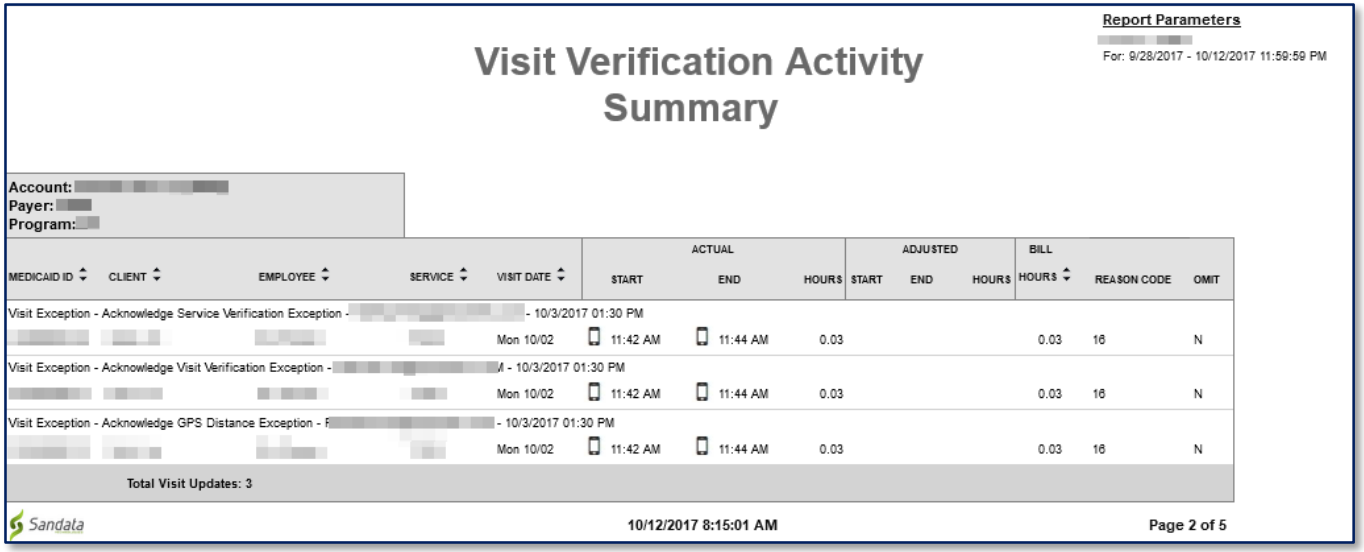
AVAILABLE REPORTS: DATE RANGE: VISIT VERIFICATION ACTIVITY SUMMARY

- This report contains a list of modifications for each visit. Only the modified visits are included in this report and the report is sorted by the user who performed the Visit Maintenance.



Report Parameters

For: 9/28/2017 - 10/12/2017 11:59:59 PM

Visit Verification Activity Summary

Account:
Payer:
Program:

MEDICAID ID	CLIENT	EMPLOYEE	SERVICE	VISIT DATE	ACTUAL START	ACTUAL END	ACTUAL HOURS	ADJUSTED START	ADJUSTED END	ADJUSTED HOURS	BILL HOURS	REASON CODE	OMIT
Visit Exception - Acknowledge Service Verification Exception - - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Visit Exception - Acknowledge Visit Verification Exception - M - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Visit Exception - Acknowledge GPS Distance Exception - F - 10/3/2017 01:30 PM													
				Mon 10/02	11:42 AM	11:44 AM	0.03				0.03	16	N
Total Visit Updates: 3													

Sandata 10/12/2017 8:15:01 AM Page 2 of 5

Use this report to review visit modifications. It includes what change was made, who made the change, when and why the change was made and the reason code related to the change.

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AVAILABLE REPORTS: DATE RANGE: VISIT VERIFICATION EXCEPTION

- This report details the various exceptions found in Visit Maintenance and lists each exception type page by page with all applicable visits. Example: GPS Distance Exception.

Report Parameters
Account:
For: 9/28/2017 - 10/12/2017 11:59:59 PM

Visit Verification Exception

Account:
Payer:
Program:
Service:
Exception Type: Client Signature Exception

SPV	MEDICAID ID	CLIENT	EMPLOYEE	VISIT DATE	ACTUAL START	ACTUAL END	ACTUAL HOURS	ADJUSTED START	ADJUSTED END	ADJUSTED HOURS	BILLED HOURS	REASON CODES	TASKS	EX
			123456	Mon 10/09		08:27 AM								
				Fri 10/06	11:29 AM									
				Fri 10/06	11:52 AM									

Total of Actual Hours: N/A
Total of Adjusted Hours: N/A
Total of Billed Hours: N/A
Total of Visits: 3

Sandata 10/12/2017 8:20:29 AM Page 1 of 23

Use this report to review the visit verification information and activity for a date range. It lists currently applied exceptions.

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AVAILABLE REPORTS: DATE RANGE: VISIT CLAIMS VERIFICATION STATUS

- This report lists all visits within selected date range regardless of the visit's status and shows the last name each visit was returned to the payer for validation.

Report Parameters

Account: [redacted]
For: 9/28/2017 - 10/12/2017 11:59:59 PM
Visit Status: In Process,Incomplete,Verified,Processed,Omit

Visits Claims Verification Status

Account: [redacted]
Provider Medicaid ID: [redacted]

Payer	Program	Service	HCPCS	Client Name	Medicaid ID	Visit Date	Visit Start	Visit End	Visit Status	Batch ID	Transaction ID	Visit Verified Date
[redacted]	[redacted]	[redacted]		[redacted]	[redacted]	10/02/2017	11:42 AM	11:44 AM	Verified			
[redacted]				[redacted]	[redacted]	10/09/2017	08:24 AM		Incomplete			
[redacted]				[redacted]	[redacted]	10/09/2017		08:25 AM	Incomplete			
[redacted]				[redacted]	[redacted]	10/06/2017	03:32 PM		Incomplete			
				[redacted]		10/09/2017		08:27 AM	Incomplete			
	[redacted]	[redacted]		[redacted]		10/09/2017		08:29 AM	Incomplete			

Use this report to track what visits have been matched to the claim for a visit or the remaining balance to reconcile outstanding claims.

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Sandata TECHNOLOGIES

QUESTIONS…